Electronic Case Filing
(ECF)

Creditor/Claimant Manual

United States Bankruptcy Court
District of Oregon

September 2007

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Help Desk

The Help Desk is for any issues related to the accessing and use of the ECF application. A member of the Clerk's Office will be available to answer questions between the hours of 8:30 a.m. and 4:30 p.m. Monday through Friday Pacific Time, except Court holidays. The Help Desk telephone numbers are:

Eugene: (541) 431-4005
Portland: (503) 326-1510
Toll Free: (866) 777-0442

For non-ECF related questions, case specific questions and all general information, call:

Eugene: (541) 431-4000
Portland: (503) 326-1500

A **Public Access to Court Electronic Records (PACER)** account is required to view case files over the Internet. Register online at http://pacer.psc.uscourts.gov. or call 1-800-676-6856 to establish an account.

Using a Browser to Log On to Electronic Case Files (ECF)

The following instructions will guide you in the basic use of a browser to log on to the ECF system.

STEP 1. On your PC desktop, access Internet Explorer by clicking on the icon.

STEP 2. The **Internet Explorer** screen displays.

- ❑ Enter the URL for the Court's website:
  - ➢ www.orb.uscourts.gov

STEP 3. The Court's website displays. Always log on to ECF through the Court's website.

- ❑ Down the left side of the page, are links to various items. Click on the red ECF button to access ECF.

STEP 4. The ECF webpage displays. Please read the information contained on the webpage. Information and updates regarding ECF will be posted on this page including when the ECF system will be unavailable.

- ❑ Click on the link: ECF Live Database

STEP 5. The **Welcome to the U.S. Bankruptcy Court for the District of Oregon** page displays.

- ❑ Click on the District of Oregon - Document Filing System hyperlink.

STEP 6. The **ECF/PACER Login** screen displays.

- ❑ Enter your ECF login and password to file documents.

OR

- ❑ Enter your PACER login and password to view electronic case files.

STEP 7. The ECF Menu Bar displays.

- ❑ ECF is organized by headings, categories and events. In the blue banner are the headings: Bankruptcy, Adversary, Query, Reports, Utilities and Logout.

- ❑ If you click on each heading, the categories available to Creditor/Claimant e-filers will display. By clicking on the category, the events available in the category will display.

- ❑ The procedures included in this manual will reference which heading, category and event to use to electronically file documents.

STEP 8. To **LOGOUT** of the ECF System:

- ❑ Click on the Logout button on the Menu Bar.

- ❑ To close the browser, click the X in the top right corner of the ECF/PACER Login screen.

ECF Filing Tips

GENERAL

- Per G.O. #03-3, Pt. 7, signatures must be denoted on electronically filed documents using "/s/ Name".
- Per G.O. #03-3, Pt. 8, routine cover or transmittal letters shall not be filed in ECF.
- Per G.O. #03-3, Pt. 20, a Certification of Compliance is not required on court forms.
- Per the Administrative Procedures, Pt. III.A.2., all e-filed documents must be in text-based pdf (i.e., not scanned) unless the filer did not create them.

CLAIMS

- Other than applications for compensation, claims are limited to 5 pages of attachments to the Proof of Claim form. You must show any additional documentation to any party or the court upon request.

SERVICE

- Per G.O. #03-3, Pt. 14, ECF registered participants waive the right to receive first class mail and consent to receive e-mail service through ECF, except for service of a summons and complaint in an adversary proceeding under FRBP 7004 or a subpoena under 9016.
- To determine what parties in a case may be served via e-mail, click on Utilities from the ECF Main Menu, click on Mailings, click Mailing Info for a Case, enter the Case Number and click Submit. The Electronic Mail List will display listing the parties who will receive electronic notice/service in the case.
- Parties get "one free look" at a document received from the ECF system.
- Per G.O. #05-1, Pt. 16, creditors may register preferred e-mail addresses with the BNC. They may request to override the preferred address in an individual case by filing a request with the court using the event **Notice of Override of Preferred Address 342(e)**. E-filers may access creditors' preferred addresses by selecting **Creditor Mailing Matrix** in the **Mailings** category under the **Utilities** heading (note that there is a PACER charge for this although a PACER receipt transaction does not display at the time).

TECHNICAL ISSUES

- To change your password, e-mail address, e-mail setup, or mailing address, click on Maintain Your ECF Account under Utilities.
- You must use Adobe Acrobat 6.0 and higher to ensure success with the court's local bankruptcy forms (LBF's) in fillable pdf format.

Special Notice Request

Use this event only if you want to add yourself as a party to the case for the purpose of receiving copies served on all parties. If you are an attorney who is now appearing on behalf of a pro se party in the case, use the Notice of Appearance event in the Notice or Creditor Claimant Entries category.

This event is text-only. A document need not be prepared ***and must not be*** filed with the court.

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Batch**.

STEP 3. The **Case Number** screen displays.

- ❑ Insert the case number(s) using the YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Confirm the debtor(s) name and case number(s) are correct.

- ❑ Select **Special Notice Request** from the event list.
- ❑ Click **Next**.

STEP 5. The **Select any additional attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ Select **Add/Create New Party** EVEN IF the party appears in the Party list.

- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create new party**".
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ Enter your address. Refer to the **Style Guide** for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
    - ❑ Click **Submit** and continue with **STEP 7.**
- ❑ If the creditor **is** in the database, a list will display.
    - ❑ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
        - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact address match, click on "**Create new party**" and follow procedures above.
    - ❑ The **Party Information** screen displays.
        - ❑ At the **Role** drop-down list, select **Creditor** as the Role type.
- ❑ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

- ❑ The creditor added is highlighted.
- ❑ Click **Next**.

STEP 8. A case verification screen displays, along with reminder messages that this event is **text-only** (i.e., you will not have a pdf file to attach), and not to be confused with the **Notice of Appearance** event (now also **text-only**). Please note it is the filer's responsibility to ensure the party and/or attorney were added in all applicable cases.

- ❑ Click **Next**.

STEP 9. A case verification screen displays.

- ❑ Click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Change of Address

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Change of Address** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, select and continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor **is not** listed, or you see **Party search results** and **No person found**, click on "**Create new party**".
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ Enter your address. Refer to the **Style Guide** for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
    - ❑ Click **Submit** and continue with **STEP 6**.

- ❑ If the creditor **is** in the database, a list will display.
  - ❑ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
    - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on "**Create new party**" and follow procedures above.
  - ❑ The **Party Information** screen displays.
    - ❑ At the **Role** drop-down list, select **Creditor** as the Role type.
- ❑ Click **Submit**.

STEP 6. The **Party Selection** screen displays.

- ❑ The creditor added is highlighted.
- ❑ Click **Next**.

STEP 7. Click **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 8. A case verification screen displays.

- ❑ Click **Next**.

STEP 9. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 10. The **Notice of Electronic Filing** screen displays.

Notice of Appearance/Representation

Use this event only if you are an attorney that is now appearing for a pro se party in this case. Otherwise use the event Special Notice Request in the Miscellaneous or Creditor Claimant Batch category.

This event is now text-only. A document need not be prepared ***and must not be*** filed with the court. Upon completion of this event, your Notice of Appearance will appear on the docket and be fully processed by the court.

Notice of Override of Preferred Address 342(e)

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Notice of Override of Preferred Address 342(e)** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, select and continue with **STEP 7.** If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the party in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g. FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor **is not** listed, or you see **Party search results** and **No person found**, click on **"Create new party"**.
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ Enter your address. Refer to the **Style Guide** for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
    - ❑ Click **Submit** and continue with **STEP 6**.

- ❏ If the creditor **is** in the database, a list will display.
  - ❏ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
    - ❏ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on "**Create new party**" and follow procedures above.
  - ❏ The **Party Information** screen displays.
    - ❏ At the **Role** drop-down list, select **Creditor** as the Role type.
- ❏ Click **Submit**.

STEP 6. The **Party Selection** screen displays.

- ❏ The creditor added is highlighted.
- ❏ Click **Next**.

STEP 7. A case verification screen displays.

- ❏ Click **Next**.

STEP 8. Click **Browse** to select the appropriate PDF to attach.

- ❏ Click **Next** twice.

STEP 9. The **Docket Text: Final Text** screen displays.

- ❏ Confirm the docket text is correct.
- ❏ Click **Next**.

STEP 10. The **Notice of Electronic Filing** screen displays.

Oregon Dept. of Revenue Objection

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❏ Enter the case number in YY-NNNNN format.
- ❏ Click **Next**.

STEP 4. Select **Oregon Dept. of Revenue Objection** from the event list.

- ❏ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❏ If ODR is already a party to the case, select and continue with **STEP 7**. If ODR is **not** a party to the case, click on **Add/Create New Party**.
- ❏ A **Search for a party** screen displays.
- ❏ Enter ODR in the **Last/Business name** field.
- ❏ Click **Search**.
- ❏ As ODR **is** in the database, a list will display.
    - ❏ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
        - ❏ Choose the appropriate ODR record (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), and click **Select name from list**.
    - ❏ The **Party Information** screen displays.
        - ❏ At the **Role** drop-down list, select **Creditor** as the Role type.
- ❏ Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- ❑ The creditor added is highlighted.
- ❑ Click **Next**.

STEP 7. A case verification screen displays.

- ❑ A message displays: **Does the Objection include a Motion to Dismiss?** The default is No. If the Objection to Confirmation of Plan includes a motion to dismiss, change to Yes.
- ❑ Click **Next**.

STEP 8. Click **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 9. The **Docket Text: Modify as Appropriate** screen displays. Select an identifier from the drop-down list if appropriate.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Oregon Dept. of Revenue Withdrawal of Objection

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Insert the case number using the YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Confirm the debtor(s) name and case number are correct.

- ❑ Select **Oregon Dept. of Revenue Withdrawal of Objection** from the event list.
- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ Select ODR as the party filer.
- ❑ Click **Next**.

STEP 6. The **Select the appropriate event(s) to which your event relates:** screen displays.

- ❑ If applicable, check the box to the left of the Objection to Confirmation of Plan being withdrawn.
- ❑ Click **Next**.

STEP 7. Click on **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 8. A case verification screen displays.

- ❑ Click **Next**.

STEP 9. The **Docket Text: Final Text** screen displays.

- ❏ Confirm the docket text is correct.
- ❏ Click **Next**.

STEP 10. The **Notice of Electronic Filing** screen displays.

Reaffirmation with and without Atty Cert; Reaffirm Consumer Debt Secured by Real Prop

NOTE: In cases filed on and after 10/17/05, **BOTH** LBF #718.05 **AND** LBF #718.5 or OF #B240 are mandatory.

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

❑ Enter the case number in YY-NNNNN format.

❑ Click **Next**.

STEP 4. Select the appropriate **Reaffirmation Agreement** event from the event list.

❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

❑ If the creditor is already a party to the case, select and continue with **STEP 7, 8** or **9**, as applicable. If the creditor is **not** a party to the case, click on **Add/Create New Party**.

❑ A **Search for a party** screen displays.

❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.

❑ Click **Search**.

- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create new party**".
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ Enter your address. Refer to the **Style Guide** for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
    - ❑ Click **Submit** and continue with **STEP 6.**
- ❑ If the creditor **is** in the database, a list will display.
    - ❑ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
        - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on "**Create new party**" and follow procedures above.
    - ❑ The **Party Information** screen displays.
        - ❑ At the **Role** drop-down list, select **Creditor** as the Role type.
- ❑ Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- ❑ The creditor added is highlighted.
- ❑ Click **Next**.

STEP 7. If using the Reaffirm Consumer Debt Secured by Real Prop event, a screen displays with the following message: **Continue with this event only if you have indicated this is consumer debt secured by Real property [i.e., answered yes to question 3 on LBF #718.05]. NOTE: Real property is only LAND being purchased, or owned, by the debtor(s) and any structures permanently attached to it. Otherwise, select the event Reaffirmation with Atty Cert or Reaffirmation without Atty Cert.**

- ❑ A second reminder appears about the requirement to have a Reaffirmation Agreement coversheet (LBF #718.05) as the 1st page of any reaffirmation agreement, along with where to retrieve this form.

- ❑ Click **Next** and continue with **STEP 10**.

STEP 8. If using the Reaffirmation with Atty Cert event, a screen displays with the following message: **Continue with this event only if the debtors attorney has signed the certification in paragraph one of Part C of the Reaffirmation Agreement and the debtor is not reaffirming consumer debt secured by Real property. NOTE: Real property is only LAND being purchased, or owned, by the debtor(s) and any structures permanently attached to it. Otherwise, select the event Reaffirmation *without* Atty Cert or Reaffirm Consumer Debt Secured by Real Prop.**

- ❑ A second reminder appears about the requirement to have a Reaffirmation Agreement coversheet (LBF #718.05) as the 1st page of any reaffirmation agreement, along with where to retrieve this form.

- ❑ Confirm Part C of LBF #718.5 is signed or an attorney's certification is attached.

- ❑ Click **Next** and continue with **STEP 11**.

STEP 9. If using the Reaffirmation without Atty Cert event, a screen displays with the following message: **Continue with this event only if the debtor was not represented by an attorney in negotiating the Reaffirmation Agreement [i.e., if an attorney did not sign the certification in paragraph one of Part C of the Reaffirmation Agreement] and the debtor is not reaffirming a consumer debt secured by Real property. NOTE: Real property is only LAND being purchased, or owned, by the debtor(s) and any structures permanently attached to it. Otherwise select the event Reaffirmation *with* Atty Cert or Reaffirm Consumer Debt Secured by Real Prop.**

- ❑ A second reminder appears about the requirement to have a Reaffirmation Agreement coversheet (LBF #718.05) as the 1st page of any reaffirmation agreement, along with where to retrieve this form.

- ❑ Confirm Part C of LBF #718.5 is not signed and an attorney's certification is not attached.

- ❑ Click **Next**.

STEP 10. At **Enter Creditor Name in This Reaffirmation Agreement** screen: Enter the creditor name on this screen.

- ❑ Click **Next** and continue with **STEP 12**.

STEP 11. The Undue Hardship question displays: **Is this Undue Hardship? Note – If amount in Pt 11b of LBF #718.05 is negative, then answer Yes that an Undue Hardship does exist EXCEPT always answer No if either: [a] the creditor is a credit union or [b] the case was filed prior to 10/17/05.** Defaults to **No**.

- ❑ Answer appropriately.
- ❑ Click **Next** and then enter the name of the creditor in the **Enter Creditor Name in This Reaffirmation Agreement** field.

STEP 12. Click **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 13. The **Docket Text: Modify as Appropriate** screen displays.

- ❑ If appropriate, use the drop-down list, and then click **Next**.

STEP 14. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 15. The **Notice of Electronic Filing** screen displays.

Request for Hearing

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Request for Hearing** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, select and continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create new party**".
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ Enter your address. Refer to the **Style Guide** for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
    - ❑ Click **Submit** and continue with **STEP 6.**

- ❑ If the creditor **is** in the database, a list will display.

  - ❑ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.

    - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on "**Create new party**" and follow procedures above.

  - ❑ The **Party Information** screen displays.

    - ❑ At the **Role** drop-down list, select **Creditor** as the Role type.

- ❑ Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- ❑ The creditor added is highlighted.

- ❑ Click **Next**.

STEP 7. The **Select the category to which your event relates** screen displays.

- ❑ If you know the category of the event, select the category from the list. If you do not know the category of the event, highlight the entire list.

- ❑ Click **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 8. The **Select the appropriate event(s) to which your event relates:** screen displays.

- ❑ Check the box to the right of the document you are requesting a hearing on (click on it so a [✓] appears in the box).

- ❑ Click **Next**.

STEP 9. A case verification screen displays.

- ❑ Click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Request for No Further Notices

This is a text-only event; a document need not be prepared and cannot be filed with the court.

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Request for No Further Notices** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ Select the party filer.
- ❑ Click **Next**.

STEP 6. A Warning message displays: **WARNING: No Further Notices will be Sent to You or Your Client Unless You are Otherwise on the Mailing List (e.g. creditor matrix).**

- ❑ Click **Next**.

STEP 7. A case verification screen displays.

- ❑ Click **Next**.

STEP 8. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 9. The **Notice of Electronic Filing** screen displays.

Transfer of Claims

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Insert the Case Number in the **YY-NNNNN** format.
- ❑ Click **Next**.

STEP 4. Select **Transfer of Claim** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ If the new party (i.e., Transferee) is listed, select them, click **Next** and continue with **STEP 8**.
- ❑ If not listed, click on **Add/Create New Party** and continue with **STEP 6**.

STEP 6. A **Search for a party** screen displays.

- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create new party**".
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ Enter the correct address for the transferee. At the **Role** field, change the role type to **Creditor**.

- ❑ Click **Submit** and continue with **STEP 7**.

❑ If the creditor **is** in the database, a list will display.

- ❑ Click on each name until you locate a record **with** the appropriate address when viewing the dialogue box that appears as each name is highlighted. If none of the existing records have an appropriate address, click on "**Create new party**" and follow the steps above.

- ❑ The **Party Information** screen displays.

  - ❑ At the **Role** drop-down list, select **Creditor** as the Role type.

❑ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

❑ The creditor added is highlighted.

❑ Click **Next**.

STEP 8. The **PDF** screen displays.

❑ Click **Browse** to select the appropriate PDF to attach.

❑ Click **Next**.

STEP 9. The Transfer of Claim information screen displays.

❑ Click on the correct **Transfer type**.

❑ **Search for transferee**. (The creditor filing the transfer) Enter the transferee's name and/or click on **Search Creditors**. If found, highlight the creditor and click **Select**. If not found, click on **Add New Creditor** and add the creditors name and address.

❑ **Search for transferor** (The creditor who filed the original claim) Enter the transferor's name or click on **Search Creditors**. Highlight the creditor's name and click **Select**. The creditor's name and claim number will appear in the box.

❑ If the transferee is transferring more than one claim in the case, multiple claims may be chosen.

- ❑ Click **Next**.

STEP 10. The **Enter the claim number(s)** screen displays.

- ❑ Enter the claim number(s) for the claim(s) being transferred. The claim number(s) should be the same as the claim number(s) displayed on the previous screen.
- ❑ Click **Next**.

STEP 11. The **Status** screen displays.

- ❑ Click on **Transfer** from the drop-down list.
- ❑ Click **Next**.

STEP 12. The **Docket Text: Modify as Appropriate** screen displays.

- ❑ Verify the docket text.
- ❑ Click **Next**.

STEP 13. The **Docket Text: Final Text** screen displays

- ❑ Click **Next**.

STEP 14. The **Notice of Electronic Filing** screen displays.

Withdrawal of Claim

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Withdrawal of Claim** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, select and continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create New Party**".
  - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
  - ❑ Enter your address. Refer to the **Style Guide** for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
  - ❑ Click **Submit** and continue with **STEP 6.**

- ❑ If the creditor **is** in the database, a list will display.
  - ❑ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
    - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on "**Create new party**" and follow procedures above.
  - ❑ The **Party Information** screen displays.
    - ❑ At the **Role** drop-down list, select **Creditor** as the Role type.
- ❑ Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- ❑ The creditor added is highlighted.
- ❑ Click **Next**.

STEP 7. The following message displays: **In the Status field, choose Withdrawn**. When the Status field displays, in Step 9, select **Withdrawn** from the drop-down list.

- ❑ Click **Next**.

STEP 8. The **Enter Claim Number(s):** screen displays.

- ❑ Enter the claim number of the claim being withdrawn.
- ❑ Click on **Browse** to select the appropriate PDF to attach.
- ❑ Click **Next**.

STEP 9. The **Status** field displays.

- ❑ Select **Withdrawn** from the drop-down list.
- ❑ Click **Next**.

STEP 10. A case verification screen displays.

❑ Click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

❑ Confirm the docket text is correct.

❑ Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Withdrawal of Document

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Withdrawal of Document** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ Select the appropriate party.
- ❑ Click **Next**.

STEP 6. The **Select the category to which your event relates** screen displays.

- ❑ Highlight the entire list to bring up all the documents in the case.
- ❑ Click **Next**.

STEP 7. The **Select the appropriate event(s) to which your event relates:** screen displays.

- ❑ Check the box to the left of the document being withdrawn.
- ❑ Click **Next**.

STEP 8. Click on **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 9. A case verification screen displays.

- ❑ Click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Withdrawal of Special Notice Request

> This is a text-only event; a document need not be prepared and cannot be filed with the court.

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Withdrawal of Special Notice Request** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ Select the appropriate party.
- ❑ Click **Next**.

STEP 6. The **Select the party or parties no longer associated with the case** screen displays.

- ❑ Select the appropriate party or parties.
- ❑ Click **Next**.

STEP 7. A case verification screen displays.

- ❑ Click **Next**.

STEP 8. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 9. The **Notice of Electronic Filing** screen displays.

File Proofs of Claim Including Amendments

Pursuant to General Order #03-3, documents filed with a Proof of Claim may NOT exceed 5 pages.

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **File Claims**.

STEP 3. The **Search for Creditor** screen displays.

- ❏ Enter the case number in YY-NNNNN format.
- ❏ Enter the name of the creditor in the **Name of creditor** field. When searching for a creditor, the more characters entered will narrow the search.
- ❏ The **Type of creditor** field defaults to Creditor.
- ❏ A reminder message displays: **Reminder: To file a Claims Transfer, use the Transfer of Claim event found in the Claim Actions or Creditor Claimant Entries category**.
- ❏ Click **Next**.

STEP 4. The **Select a Creditor for Claim** screen displays.

- ❏ If the creditor **is** listed, select the creditor from the drop-down list if the name and address are an **exact** match, click **Next** and continue with **STEP 11**.
- ❏ If the creditor **is not** listed or **not an exact match BUT** is a common creditor, click on **Add Common Creditor**. The **Add Common Creditor(s)** screen displays, click **Next**. Select the common creditor and click **Next**. Confirm name and address are correct and click **Next** again. Proceed to **STEP 7**.
- ❏ If the creditor **is not** listed or **not an exact match** and **not** a common creditor, click on **Add Creditor** to add the creditor and continue with **STEP 5**. **EXCEPTION:** If you are **amending** a prior claim and your name/address differs from the original record, you must pick the original record or ECF will not consider you as holder of the claim. The Court will catch the discrepancy in the QC process, and at that time update the record to reflect the name/address as listed on the amended claim.

STEP 5. A case verification screen displays.

- ❑ Confirm the debtor(s) name and case number are correct.
- ❑ Click **Next**.

STEP 6. The **Add Creditor(s)** screen displays.

- ❑ Enter the name and address of the creditor. If there are two addresses, one for notices and one for payments, enter the address for notices. Note the instructions for formatting on the screen. Do Not use all caps while adding the name and address (though common name abbreviations like “FMCC” or “ECMC” are fine).
- ❑ The **Creditor type** field defaults to **Creditor**.
- ❑ Click **Next**.

STEP 7. The **Total Creditors Entered** screen displays.

- ❑ Confirm the number of creditors entered is correct.
- ❑ Click **Submit**.

STEP 8. The **Creditors Receipt** screen displays.

- ❑ Confirm the number of creditors added to database is correct.
- ❑ Click on **File a Proof of Claim**.

STEP 9. The **Search for Creditor** screen displays.

- ❑ Confirm the case number is correct or enter the correct case number.
- ❑ Enter the entire name or a portion of the name of the creditor in the **Name of creditor** field.
- ❑ The **Type of creditor** field defaults to Creditor.
- ❑ Click **Next**.

STEP 10. The **Select a Creditor for Claim** screen displays.

- ❑ Confirm the case number and case name are correct.
- ❑ Select the creditor from the drop-down list. If the creditor is listed more than once, select the creditor name with the correct address.

- ❑ Click **Next**.

STEP 11. The **Proof of Claim Information For** screen displays.

- ❑ Confirm the correct creditor and address are listed.
- ❑ If the claim amends a previously filed claim, enter the claim number of the original claim in the **Amends Claim #:** field.

> **NOTE:** Pursuant to LBR 3001-1.A.3.b., if amending a claim in a Chapter 12 or Chapter 13 AND the time for filing for claims has expired, LBF #302 is required.

- ❑ Select the appropriate party from the drop-down list in the **Filed By:** field. The default is Creditor.
- ❑ Enter the amount of the claim in the appropriate fields under **Amount Claimed**. **NOTE:** If the amended claim changes status (i.e., from secured to unsecured) or the amount for a certain status changes to $0.00, enter 0.00 in that status field. This will clear the previous amount listed on the claims register.
- ❑ **DO NOT** enter any information in the **Description** and **Remarks** fields.
- ❑ Click **Next**.

STEP 12. Click **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 13. The **Notice of Electronic Claims Filing** screen displays.

NOTE: The trustee does receive e-mail notification of the filing of the claim even though it is not indicated on the Notice of Electronic Claims Filing.

Query

Figure 2

Query is one of the main items on the blue banner Main Menu (*Figure 2*) that appears immediately after a user logs in. A user can search for a particular case or adversary proceeding by its case number, or search for a case or cases in which an individual or other entity has appeared. A user can find the desired case by using any combination of the available fields shown below in *Figure 3*.

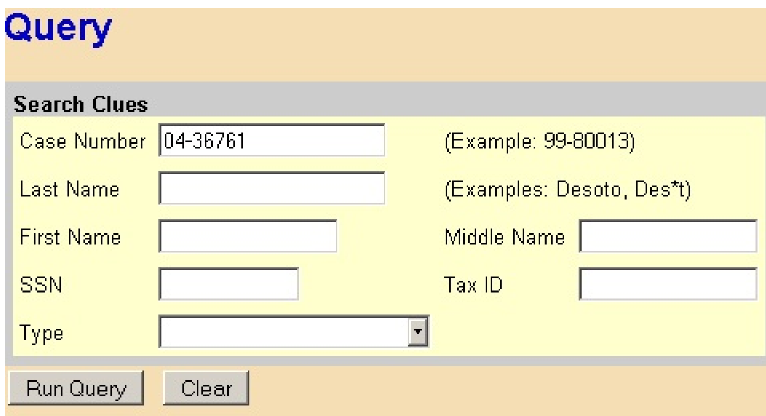

Figure 3

NOTE: PACER charges apply to any query or report run.

Search Clues Screen

STEP 1. A user may search by Case Number, Last Name, SSN, or Tax ID. Values may be entered in the First Name, Middle Name, and/or Type fields to help narrow a Last Name search. In ECF, full business names are always entered in the Last Name field.

STEP 2. To Search by **Case Number**, click the case number field and enter the case number (YY-NNNNN for bankruptcy case or YY-NNNN for adversary proceeding).

❑ Click on **Run Query** to continue or **Clear** to reselect the criteria.

STEP 3. To search by **Party Name**, click inside the Last Name field and enter the appropriate information. [**Note**: Users can enter the full last name or a portion thereof using the "*" only for missing interior letters per the example in *Figure 3*.]

- ❑ To further limit the name search, select a specific party type from the drop-down box in the **Type** field.
- ❑ When all of the search clues have been entered, click **Run Query** to continue or **Clear** to remove all the entries and begin again.

Results of Search

STEP 1. If more than one person record fits the search data, all will display as hyperlinks. Click on the name desired, and a list of associated cases will appear. Next, click on a case number, and a brief summary will appear at the top of the screen with a list of hyperlinked options.

STEP 2. Select a desired hyperlink from the following options:

- ❑ **Alias** - Displays all aliases associated with the debtor(s).
- ❑ **Associated Cases** - Displays other bankruptcy cases or adversary proceedings associated with the specific case, if any.
- ❑ **Attorney** - Displays all attorneys associated with the case except for those who have only filed claims.
- ❑ **Case Summary** - Displays a summary of basic case information which includes dates filed, discharged, dismissed, or converted, names of debtor(s), debtor's attorney, trustee, and other information.
- ❑ **Claims Register** - Displays a claims register which can be generated by Creditor Type, Creditor Name, Creditor Number, Claim Number(s), and Dates(s) Filed/Entered. Two levels of sort are provided.
- ❑ **Creditor** - Displays a list of all creditors in the case.
- ❑ **Creditor Mailing Matrix** - Displays a creditor mailing matrix with or without special mailing groups in either a 3 column format, or raw data format. [**NOTE**: To print mailing labels using commercially available "label paper" (*e.g.*, Avery 5260) and word processing software (*e.g.*, Corel WordPerfect or Microsoft Word), select "3 column format", and copy and paste the names and addresses from ECF to the word processing software using the label function.]
- ❑ **Deadline/Schedule** - Displays deadlines/hearings set in a case. This report has multiple sort features, a hyperlink to the actual PDF document, and a radio button to related filings.

- **Docket Report** - Displays the official case docket. It has multiple sorting options, including sort by File Date or Entered on the Docket Date, but for best results, use the "File Date" option. The docket report that is displayed may then be printed.

- **Filers** - Displays a list of entities who have filed something in the case (NOT including those who have only filed claims) and the date the entity was added to the case. Clicking on the name of an entity will bring up a list of documents filed by that entity, with a hyperlink to docket information for each entry and any related entries on the docket.

- **History/Documents** - Displays listing of entries/documents made or filed in a case, with sorting options, docket text if desired, and hyperlinks to view the actual PDF documents.

- **Notice of Bankruptcy Case Filing** - Displays a *Notice of Electronic Case Filing* with the date and time of filing, and a court seal affixed to prove authenticity. This notice can be printed to show third parties.

- **Party** - Displays the names and addresses of all parties who have filed anything in the case (NOT including those who have only filed claims) with the name and address of any attorney who represents them.

- **Related Transactions** - Displays case transactions in a box and any other transactions to which it is related (linked). The user may select the type of document to include, pending or terminated (or both), and sort using either filed date, entered date, or document number.

- **Status** - Displays most current case status (*i.e.*, Confirmed, Closed, Reopened, Converted, etc).

- **Trustee** - Displays name of case trustee.

STEP 3. To continue, click on the desired Main Menu item.

STEP 4. To print a report, click on **Print** button or icon from the browser toolbar.

Reports

Figure 4

Reports is one of the main headings on the ECF banner menu. An ECF user can access the following reports via this option: Cases, Claims Register, Claims Activity Report, Docket Report, Calendar Events, Creditor Mailing Matrix, Docket Activity, Order Query, and Written Opinions. The selection criteria for each of these reports are explained below but are also available on the Help screen that can be accessed by clicking on the yellow question mark on the banner menu. (***See* Figure 4 above**)

IMPORTANT NOTE

Users are cautioned that reports that cover long periods of time could include dozens, if not hundreds, of pages. Because there is a per page charge for accessing reports and documents in ECF (*charged by PACER whether or not the user prints the report or document)*, a user is well advised to enter selection criteria carefully.

Click on one of the hyperlinks below to go directly to that section:

Cases **Claims Register**
Claims Activity Report **Docket Report**
Calendar Events **Creditor Mailing Matrix**
Docket Activity **Order Query**
Written Opinions

Cases

Displays cases filed, entered, discharged, dismissed, closed or converted.

STEP 1. Click on **Reports** from the Main Menu, and then click on **Cases** hyperlink. The selection criteria screen displays, and allows the user to specify what information to include in the report.

> **TIP**: Users may leave the **Office**, **Case Type**, **Chapter**, or **Trustee** fields blank to search on all items that appear on those lists. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.

❑ **Office** - Select either the Portland or Eugene office.

❑ **Case Type** - Select either Adversary Proceeding (ap), Bankruptcy Case (bk), or Miscellaneous Proceeding (mp).

❑ **Chapter** - Select either Chapter 7, Chapter 9, Chapter 11, Chapter 12, Chapter 13, Chapter 15, or 304 Case (Predecessor to Chapter 15).

❑ **Trustee** - Select one or more of the trustees from the list provided.

❑ Date Type - Several options are presented. The user may select the date (or range of dates) that the case(s) were **Filed**, Entered, **Discharged**, **Dismissed**, **Closed** or **Converted** by entering a beginning date in the "From" box and an ending date in the "to" box.

❑ **Terminal digit(s)**- Leave Blank.

❑ **Open/Closed Cases** - Click in the box to remove or add a check to the applicable box.

❑ **Party Information** - Click in the box to have the report display party information such as address, tax ID, etc., if desired.

❑ **Sort by** - Allows three boxes in which to select the desired sort. Click the down arrow at the end of each box to choose from the list.

❑ **Output Format** - Choose between "Formatted Display" or "Data Only".

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria. Case Report screen displays.

STEP 3. To view a case docket, click on the case number hyperlink.

STEP 4. To print the report, click on the **Print** button or icon from the browser toolbar.

Claims Register

The Claims Register report displays the claims filed for a specific case.

STEP 1. Click on **Reports** from the Main Menu, and then click on the **Claims Register** hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

STEP 2. Selection Criteria include:

- ❏ **Case number** - Click in box and enter the correct case number (using YY-NNNNN format).
- ❏ **Creditor type** - Leave blank, as all creditors are uploaded to a case.
- ❏ **Creditor number** - This box can be ignored as creditor numbers are no longer used.
- ❏ **Creditor name** - Leave blank to bring up all creditors who have filed a claim, or click in the box and enter a specific creditor's name. (*Users can enter only the first letter or the first few letters of the creditor's name to get the most thorough search. If users type the entire name, only exact matches will be displayed*).
- ❏ **Claim number** - Leave blank to display all claims that fall within other search criteria, or click inside the boxes and type the specific claim number(s).
- ❏ **Filed** or **Entered** - The claims register will display claims filed or entered within the date range specified. By entering dates in the beginning and ending fields, only claims filed or entered within a certain time frame will appear on the report. Leave blank to view all claims.
- ❏ **Sort by** - Two sort criteria are offered. Click the down arrow to the right of the field and choose from the options on the list.

STEP 3. Click **Run Report** to continue or **Clear** to reset the search criteria. The **Claims Register** displays. A summary of the register appears at the bottom of the report.

STEP 4. To view a *Proof of Claim* and any supporting documentation, click on the claim number hyperlink in the "History" box where the associated text references a *Claim* #____. To view a docketed item referenced in the claims register (*e.g.*, withdrawal, objection to claim, transfer of claim, etc.), click on the document number hyperlink next to the docket text for the desired document. To view the case docket, click on the case number hyperlink at the top of the claims register.

STEP 5. To print the claims register, click on the **Print** button or icon from the browser toolbar.

Claims Activity Report

The Claims Activity Report lists information about claims (generally not all pertaining to a single case as with the *Claims Register*) along with links to any associated documents. For example, this report can display a list of all claims filed in a particular case involving a single trustee.

STEP 1. Click on **Reports** on the ECF Main Menu, and then click on the **Claims Activity Report** hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

STEP 2. Selection criteria include:

- ❑ **Case number** - To see claims for a particular case, enter a case number. To view claims in all cases, leave this field blank.
- ❑ **Office** - To limit claims by the office in which the case was filed, select one or more offices from the list. To view claims in both offices, leave this field blank.
- ❑ **Trustee -** To limit the claims displayed to those filed for a particular **trustee**, select the desired option from the drop-down list. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.
- ❑ **Chapter -** To limit the claims displayed to those filed in a particular chapter, select the appropriate option from the drop-down list. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.
- ❑ **Creditor name** - To limit claims to those filed by a particular creditor, enter the name. (*Enter only the first letter or the first few letters of the creditor's name to get the most thorough search. If the entire name is entered, only exact matches will be displayed*).
- ❑ **Entered Between** - To limit claims by the date on which they were entered, enter a date range.
- ❑ **Sort by** - Three levels of sorting are provided.

STEP 3. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 4. The *Claims Activity Report* displays.

- ❑ To view a *Proof of Claim* and any supporting documentation, click on the claim number hyperlink in the left column.

STEP 5. To print, click on the **Print** button or icon on the browser.

Docket Report

The Docket Report allows the user to view and print a listing of all events docketed to a specific case. The default for the display of docket entries on this report is oldest date first, but the user has the option to switch the display order, as noted below in **STEP 2**.

STEP 1. Click on **Reports** from the Main Menu, then, click on the **Docket Report** hyperlink. The Selection Criteria screen displays and allows the user to specify what information to include in the report.

NOTE: The opportunity to review charges FIRST applies to PDF documents only. PACER charges apply if user runs ANY report.

STEP 2. The case number of the last case accessed during the current ECF session displays automatically. Users can type another case number if they want to view the docket report for a different case using the YY-NNNNN format for bankruptcy cases and the YY-NNNN format for adversary proceedings. This is a required field.

- ❑ **Filed** or **Entered** option - To limit entries displayed to a date range, for best results select "filed" (when the document was filed) rather than "entered" (when the entry was recorded by the Court in ECF) by clicking the desired radio button.

  After selecting the date type to be displayed, user may choose to enter a date range for the docket to display using the format MM/DD/YY or MM/DD/YYYY to limit the display.

  User can enter a start date with no end date, which will include all entries from the date specified onward, or user can enter an end date and no start date, which will include all entries up to the specified date.

  If no dates are entered, all entries will be selected. PACER charges apply to the number of pages displayed.

- ❑ **Documents** - Leave blank to display all documents or enter a beginning and ending document number range to limit the display. This feature enables users to be charged only for the desired data on large cases.

- ❑ **Include terminated parties** - Click in the box to have the docket display include all parties including those who have been terminated from the case. Uncheck the box to show only current parties in the case.

- ❑ **Include links to *Notice of Electronic Filing*** - Click in the box to have access to the *Notice of Electronic Filing* for certain documents. The hyperlink back to a copy of the *Notice of Electronic Filing* that was created when the event was originally filed will show on the docket as a "silver ball" link. It will reflect those parties who received electronic notification of the filing.

- ❑ **HTML** and **Text** - Click on the radio button to obtain the type of report desired.

- ❑ **Sort by** - Click the down arrow to the right of the box to select how the docket is to be sorted. These options can affect the number of pages displayed and the PACER charges that apply. The options are: Oldest date first, Most recent date first, Document number ascending, and Document number descending.

STEP 3. Click **Run Report** to continue or **Clear** to reset all fields to their default values. The **Case Docket Sheet** screen displays.

> **TIP:** There is a scroll bar to the right of the screen which will move the docket sheet up or down.

STEP 4. To view a specific document, click on the document number hyperlink.

STEP 5. To view the *Notice of Electronic Filing*, click on the silver ball next to the docket number hyperlink.

- ❑ Click the desired radio button for **Select Receipt Type**.

- ❑ Click **Display Receipt** to continue or **Clear** to re-select receipt type.

- ❑ The ***Notice of Electronic Filing*** screen displays.

- ❑ To print click the **Print** button or icon on the browser toolbar.

STEP 6. To print the docket, click the **Print** button or icon on the browser toolbar.

Calendar Events

This report will provide a list of scheduled hearings on a single day. It allows selection by case number, judge, date, or other criteria. It will also display related proceedings and provide hyperlinks to the documents giving rise to the proceedings.

STEP 1. Click on **Reports** on the ECF Main Menu, and then click on the **Calendar Events** hyperlink.

STEP 2. The Calendar Events screen displays. The following fields are available for selecting/entering criteria for generating the report:

> **TIP:** Users may leave the **Case number** and **Judge** fields blank to include all items that appear on those lists. To select two or more items listed for a field, while holding down the Control Key (Ctrl), click on each item to be included from the list. To limit the report, click on the desired item(s). The default setting is for "all".

- ❑ **Case number** - Enter a case number if a schedule only for a particular case is desired.
- ❑ **Judge** - Click on one or more names from the list to limit the calendar to (a) particular judge(s).
- ❑ **Office** - Click on either Portland or Eugene to limit the calendar to either of those offices.
- ❑ **Calendar events** - Select one or more types from the list. The default is All Hearings.
- ❑ **Set** - Enter the beginning date and ending date for the desired hearings(s) in MM/DD/YY format and click either AM or PM or Both.
- ❑ **Time** - Enter the time, if desired, or leave blank for all.
- ❑ **Sort by** - The default sort for the report is by hearing time and case number. The "Office, Time" sort may be selected, but events which are not associated with a case or an office will be listed under the first office.

STEP 3. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 4. The **Calendar Event Report** displays.

STEP 5. To view case information, click on the case number hyperlink to get the *Docket Report*. User may change the sort or simply click **Run Report.** (*Refer to preceding Docket Report section of this manual for specific information on how to generate a docket report*).

STEP 6. Clicking on the silver ball will bring up any related proceedings with hyperlinks to the documents giving rise to the proceedings.

STEP 7. To print the report, click on the **Print** button or icon from the browser toolbar.

Creditor Mailing Matrix

This report displays the list of names and addresses of creditors and parties for a specific case. The list contains those creditors uploaded at case opening and those added later, and also includes parties that have filed a pleading or *Special Notice Request* in a case.

STEP 1. Click on **Reports** from the Main Menu, and then click on the **Creditor Mailing Matrix** hyperlink. The selection screen displays and allows the user to specify what information to include in the report and the format.

- ❑ **Case number** - Enter case number using the YY-XXXXX format.
- ❑ **Special Mailing Group** -Select "All" to include all special mailing groups, select specific group(s) to display the names and addresses of only their members, or leave blank to exclude special mailing group members.
- ❑ **Format** - Select either a "3 column" format or a "raw data format" (pipe-delimited). The 3-column file can be saved as a text file on the computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels. [**NOTE**: To print mailing labels using commercially available "label paper" (*e.g.*, Avery 5260) and word processing software (*e.g.*, Corel WordPerfect or Microsoft Word), select "3 column format", and copy and paste the names and addresses from ECF to the word processing software using the label function.]

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 3. To print the mailing matrix, click on the **Print** button or icon from the browser toolbar.

Docket Activity

This report provides a list of docket entries in the user's cases on a specific date or range of dates. It is particularly useful if e-mail account or Internet Service Provider (ISP) problems have caused you not to receive *Notices of Electronic Filing* for a particular date.

STEP 1. Click on Reports from the Main Menu, and then click on the Docket Activity hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

STEP 2. Selection Criteria include:

> **TIP:** User may leave the **Office, Case Number**, **Case Type**, and **Category** fields blank to include all items that appear on those lists. To select two or more items listed for a field, while holding down the Control Key (Ctrl) click on each item to be included from the list. To limit the report, click on the desired items. The default setting is for all.

- ❏ **Case Number** - Enter the case number if you simply want a list of docket entries for only one case.
- ❏ **[Attorneys only] Only cases to which I am linked** - Check the box if this limitation is desired.
- ❏ **Office** - Select either Portland or Eugene (clicking on neither will default to both offices).
- ❏ **Case Type** - Select main bankruptcy case (bk), adversary proceeding (ap), and/or miscellaneous proceeding (mp).
- ❏ **Category** - Select one or more categories from the list (*e.g.*, answer, appeal, order, plan, etc.).
- ❏ **Entered Between** - Enter the date range (using month, day, and year) for which you would like to view all activity in your cases.
- ❏ **Summary Text** or **Full Docket Text** - Choose "Summary Text" for a short description of the document (*e.g.*, withdrawal of claim) or "Full Docket Text" for the complete docket text including the name of the filer.
- ❏ **Sort By** - Two sort criteria are offered (case number and date/time). Click the down arrow to the right of the field and choose one of the options.

STEP 3. **Click Run Report**. The report will display.

STEP 4. To view a document, click on the Document Number hyperlink under “Doc ID”. To view a docket report, click on the Case Number hyperlink.

STEP 5. To print the report, click the **Print** button or icon on the browser toolbar.

Order Query

This report will allow the user to check on the status of any order submitted, but not yet signed or entered by the Court.

STEP 1. Click on **Reports** on the ECF Main Menu Bar.

STEP 2. Click on **Order Query**.

STEP 3. The **Query Order Status** screen displays.

- ❑ Enter the case number using the YY-NNNNN or YY-NNNN format.
- ❑ Click **Next**.

STEP 4. The screen will then show the status of any pending (*i.e.*, unsigned) proposed orders.

- ❑ If desired, click on the **Case Number** hyperlink to view the docket, the **Related Doc#** hyperlink to view the underlying motion or application, or the **Order** hyperlink to view the proposed order.
- ❑ If a submitted order does not appear on this screen, it may have been signed by the judge, in which case you will receive electronic notification when it is docketed. Alternatively, the judge may have denied the motion or application and deleted it from ECF, in which case the judge will be notifying the interested parties regarding the reasons the motion or application was denied (generally via correspondence).

STEP 5. To print the contents of the order status screen, click on the **Print** button or icon from the browser toolbar.

Written Opinions

This report will allow the user to access written opinions pertaining to a particular case, or opinions issued from a particular office and/or date range. [**NOTE**: Written opinions can also be obtained from the **Opinions** portion of the Court's web site.]

STEP 1. Click on Reports on the ECF Main Menu Bar, and then click on the Written Opinions hyperlink. The Written Opinions Report screen displays. The following fields are available for selecting/entering criteria for generating the report:

- ❑ **Case Number** - If seeking an opinion in a particular case, enter the case number using the YY-NNNNN or YY-NNNN format.

- ❑ If seeking an opinion in a particular case where the case number is unknown, enter party information using **Last Name**, **First Name**, and/or **Middle Name**.

- ❑ **Office** - Click on either "Portland" or "Eugene" to limit the search to a particular office.

- ❑ **Filed between** - If seeking (an) opinion issued on a particular date, or all those in a particular date range, enter the applicable date(s) in the box(es).

- ❑ **Summary text** or **Full docket text** - Choose "Summary text" for a short description of the document or "Full docket text" for the complete docket text including the filer.

- ❑ **Sort by** - From the pull-down menu, select either "Case Number" or "Date Filed".

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 3. The screen will then display a *Written Opinions Report* with hyperlinks to the cases and opinions meeting the search criteria selected in Step 1. To access the opinion, click on the hyperlink under "Doc. #". To access the docket for a case, click on the hyperlink under "Case Name & Number".

STEP 4. To print either the *Written Opinions Report* or any of the opinions hyperlinked to that report, click on the **Print** button or icon from the browser toolbar (or from Adobe Acrobat if printing an opinion).

Utilities

Utilities permit you to manage your interactions with the ECF system and give access to case mailing information.

STEP 1. Click on UTILITIES on the ECF Headings Bar.

STEP 2. Menus titled **Your Account**, **Miscellaneous** and **New R3.1 Menu Items** will display.

- ❏ The items on the **Your Account** menu allow you to access and manage your interactions with the ECF system as well as your PACER account as long as you have your PACER account associated with your login.

    - ❏ To associate your login to your PACER account, go to Reports or Queries and click any menu item. You will be prompted for your PACER login and password. If you click the little box which says **Make this my default PACER login**, you won't need to enter it ever again and you will have all of the options listed here on your Utilities menu. If you do not do this, the options that allow you to manage your PACER account will not appear on your menu.

- ❏ The items on the **Miscellaneous** menu give you access to creditor lists for mailing and service purposes.

- ❏ Clicking on **Court Information** gives access to the following topics: Court Details; Court Locations; PACER Details; and Flag Definitions (Flags are found in the upper right hand corner of a given case docket). There is an option to "View as XML" at the bottom of the page. A link for this utility also appears on the CM/ECF "Welcome" page.

Change Your Client Code

This option allows entry of a new client code which is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty-two alphanumeric characters long. It is used for reporting charges made to the current PACER account.

STEP 1. Click on **Utilities**, then, under the **Your Account** heading, click the **Change Your Client Code** hyperlink.

STEP 2. Enter a new client code.

STEP 3. Click **Submit** to continue or **Clear** to reset.

STEP 4. Click on a Heading option of your choice on the blue ECF banner to continue.

Change Your Pacer Account

This screen lets you specify the PACER account to be charged for accessing ECF data. You will still have the privileges of the ECF account you used to start this session.

STEP 1. Click on **Utilities,** then, under the **Your Account** heading, click the **Change Your PACER Account** hyperlink.

STEP 2. Enter PACER login, password, and an optional client code.

STEP 3. If you check the box labeled "Make this my default PACER login", the one you enter here will replace any default you specified previously (if you establish a default, you will not be asked for a PACER login when you request data).

STEP 4. Click **Login** to continue or **Clear** to reset.

STEP 5. Click on a Heading option of your choice on the blue ECF banner to continue.

Maintain Your ECF Account

This function allows you to update your personal information and instructions about email notification.

STEP 1. Select **Utilities** then, under the **Your Account** heading click on **Maintain Your ECF Account** hyperlink.

- ❑ The **Maintain User Account** screen appears.
- ❑ Make appropriate changes or additions to your address, telephone number and/or fax number. NAME FIELDS CANNOT BE MODIFIED.
- ❑ Click **Submit** upon completing all changes/additions or **Clear** to reset.

STEP 2. Click the **Email information** button to specify how you want to be notified of ECF filings and the email address at which you want to receive notification.

- ❑ The email information for your account appears.
- ❑ **Primary email address** - specify the complete email address.
- ❑ **Send the notices specified below** - select either or both of the options: **to my primary email address**; and/or **to these additional addresses** and add additional email addresses in the text box.
- ❑ To receive notices for a case in which you are not involved, check the box for **Send notices in these additional cases** and enter the case number(s) in the text box.

- ❑ **Format notices** - select appropriate format: Either **html format** (for Netscape, Microsoft Explorer or ISP email service) or **text format** (for cc:Mail, GroupWise, other email service).

- ❑ Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed.

- ❑ Click **Submit** to make changes or click **Clear** to clear changes you may have made.

STEP 3. Click the **More user information** to make changes to your password.

- ❑ When you change your password, the new word is readable but only this once. Whenever this screen displays again, the password will be hidden.

- ❑ The groups to which you belong are listed. Group membership determines which functions you may use.

- ❑ Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed or click **Clear** to clear changes you may have made.

STEP 4. After all changes/additions have been made, click **Submit**. The system will display all cases you are involved in.

- ❑ **Update All** - default selection, click **Submit** to have address changes spread to all cases. To have address update spread to specific cases, but not all, hold down <Ctrl> key while clicking on specific cases.

- ❑ The updated information will be displayed.

STEP 5. Click on a Heading option of your choice on the blue ECF banner to continue.

Review Billing History

This option displays the number of ECF pages accessed and charges incurred for the PACER account you are currently using. Click on **Utilities,** then, under the **Your Account** heading, click on **Review Billing History** hyperlink.

- ❑ **Transactions dated** - Enter date range for which you want to see the billing data. **NOTE**: charges incurred at this ECF site during the last 3 months can be viewed. Older transactions can be viewed from the PACER Service Center Web site.

- ❑ **Sort** - If you enter client codes when you access ECF, the charges are totaled for each code. You can sort the report by date the charges were incurred, or by client code, then by date.

STEP 1. Click **Submit** to continue or **Clear** to reset display criteria. Billing history will display.

STEP 2. Click on a Heading option of your choice on the blue ECF banner to continue.

View Pacer Account Information

This option displays the current PACER account and client code, if any, in which you are currently logged into the database.

STEP 1. Click on **Utilities** from the blue banner Heading bar, then click on **View PACER Account Information** hyperlink.

- ❑ System displays the account information used to log into PACER.

STEP 2. To continue, click on a Heading on the blue ECF banner.

View Your Transaction Log

This option displays details of all transactions (docketing, etc.) on ECF on or between the dates you specify.

STEP 1. Click on **Utilities** from the blue banner Headings bar, then click on **View Your Transaction Log** hyperlink.

STEP 2. Enter the start date and end date for the report you want displayed.

STEP 3. Click **Submit** to continue or **Clear** to reset the dates.

- ❑ A list of all your activities in ECF during the time specified displays.
- ❑ To print the transaction log, click on **Print** from your browser toolbar.

STEP 4. To continue, click on a Heading on the blue ECF banner.

Clear Default PACER Login

This option removes the association between your ECF login and default PACER account so that a new default can be set.

STEP 1. Click on Utilities from the blue banner Headings bar, then click on Clear Default PACER Login hyperlink.

STEP 2. A message displays: **Default Pacer Account now removed.**

Mailings...

This option gives you access to Creditor Mailing Matrix, Mailing Information for a Case and Mailing Labels by Case.

Creditor Mailing Matrix - Displays creditor names/addresses for a single case.

STEP 1. Click on **Utilities** and, under the **Miscellaneous** menu, click on **Mailings...**, then, click the **Creditor Mailing Matrix** hyperlink.

- ❑ **Case Number** - Enter the case number of the bankruptcy case in the YY-NNNNN format.
- ❑ **Special Mailing Group** - Skip this field.
- ❑ **Format** - Select either a "3 column" format or a "raw data format" (pipe-delimited). The one column file can be saved as a text file on your computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels.

STEP 2. Click **Run Report** to continue or **Clear** to reset the selections.

Verify a Document

STEP 1. Click on **Utilities** from the Main menu and, under the **Miscellaneous** menu, click on the **Verify a Document** hyperlink.

STEP 2. Enter the case number using the YY-NNNNN format.

STEP 3. Enter the document number you wish to verify.

STEP 4. Click **Next**.

STEP 5. If the case and document are valid, the following items are displayed:

- ❑ **Case Number and Title** - Click on the number and name(s) hyperlink to view the case docket.
- ❑ **Docket entry** - The filed date, document number and docket text of the entry in which the document was filed are listed. Click on the document number hyperlink to view the PDF.
- ❑ **File size is** - The size of the document in bytes is displayed.
- ❑ **Original Signature(s) and Verified Signature(s)** - Lists the document number, document description, original filename and electronic document stamp. **NOTE:** If these are not shown, there is no PDF document associated with the docket entry.

- **Verification** - States whether the original and verified signatures are the same or different.